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# STRATEGIC PLAN 2023-2027

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Dear Friends & Colleagues,

It's finally here! After ten months of in-depth work, I am thrilled to share our 2023–2027 strategic plan with you all.

We started our planning process in April 2022 with the hire of our planning consultant, Jake McIntire, Principal and Founder of Union Creative Agency. We spent the first three months focusing on internal introspection: who we are now and where we'd like to be in five years. Our journey included our staff, Board, long-standing audiences, and new audiences in an extensive, community-driven process that feels reflective of the state of history today and the needs that exist on the horizon.

We've heard from educators and museum practitioners to scholars long steeped in Utah's history, and I hope that you see yourself reflected in a plan that will intentionally evolve as we do over the next five years. Thank you for joining us on our journey!

Sincerely,

A handwritten signature in orange ink that reads "Jennifer Ortiz". The signature is fluid and cursive, with the first name and last name clearly distinguishable.

Jennifer Ortiz, Director, Utah Historical Society

Greetings,

The Board of State History enthusiastically shares our Strategic Plan. The Strategic Plan details our vision for how we collaborate with communities across Utah to do history work. Working with stakeholders, we identified strategic priorities to provide actionable undertakings for our team to meet the mission of State History and to take our organization into the future.

The Board recognizes the dedication of State History staff in developing this important document. As you engage with our Strategic Plan, you see the results of their efforts on every page. You feel their passion for inclusion, accessibility, and engagement to build partnerships and amplify local history work. The Strategic Plan visions a better connected, vibrant, and resilient organization that serves Utah.

The Strategic Plan's strengths lie within the depth and breadth of contributions received from our network of community partners, scholars, and members. The people of Utah hold a keen sense of their history and welcome opportunities to contribute to our collective narrative. This community-driven Strategic Plan offers a roadmap to meet that excitement and ensure all feel welcome to share their story.

I look forward to our years ahead as an organization and know that this Strategic Plan will challenge us all to do better work for our State.

Eagerly,



Molly Boeka Cannon, Chair, Utah Historical Society



# MISSION STATEMENT

The Utah Historical Society's mission is to foster curiosity about the past, inform the present, and strengthen our shared future.

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# OUR VISION

**We envision a Utah Historical Society that is:**

**Outward  
Facing**

**Engaged**

**Proactive**

**Integrated**

**Bridge  
Building**

**Through our work, we envision the following impacts:**

**Cultivating  
empathy and  
understanding**

**Fostering  
trust among  
staff, partners,  
communities,  
and new  
audiences**

**Establishing  
a paradigm  
of diverse  
and inclusive  
historical  
practice**

**Helping all  
Utahns see  
themselves in  
Utah history**

**Ensuring  
the practice  
of history is  
valued and  
reliable,  
steeped in  
credible,  
evidence-  
based research**

# OUR VALUES

## Respectful

We are committed to holding and demonstrating a deep respect for the peoples and histories of Utah. This means bringing empathy, care, and thoughtfulness into the way we work and engage with all Utahns.

## Inquisitive

We are driven by a passion for discovery and curiosity. We find inspiration in uncovering and capturing untold stories and helping Utahns see themselves in new ways through Utah history.

## Collaborative

We approach our work with an eye towards internal and external collaboration. Through collaboration, we are able to best accomplish our work and mutually support the missions, goals, and aspirations of our partners, colleagues, and supporters.

## Stewardship

As the state's historical society, stewardship is central to all we do—managing the state's collections, holding space for conversation, publishing history work, and providing resources to Utahns who support our collective histories. We see this as a great honor, opportunity, and responsibility.

## Expertise

Our staff, Board members, and partners are experts in their fields. This means bringing knowledge, integrity, rigor, and passion into all aspects of our work. Grounded in best practices, our work connects historical methodologies and skills with living communities. We recognize that expertise includes scholarship, lived experience, tradition-bearing, and community belonging.

## Community Representation

We strive to ensure all our work not only supports but deeply represents the many communities of Utah. This means doing with, *not for*, and keeping ourselves open to learning from new perspectives.

# WHO WE ARE

The Utah Historical Society is a public history organization dedicated to sharing the history of the state through scholarship, research, library & collections, and public engagement. UHS has seven core initiatives that constitute the agency, helping to tell the story of the history of the state.



## **Cemeteries Program**

Our Cemeteries program manages over 700,000 historic and active burial records in addition to keeping up-to-date records on historic cemeteries across the state. This program provides technical assistance for the preservation of headstones and grants to cemetery record managers.



## **Library & Collections**

The library and collections team is responsible for managing thousands of objects, pamphlets, books, maps and other material culture associated with the state's history. In addition to preserving the state's historic collections, the team runs the Engagement Room, an outlet for researchers and the public to engage with our collections in-person.



## **Museum of Utah**

The latest Museum of Utah initiative started in 2019 when the Speaker of the House, Brad Wilson, endorsed building a new museum as part of a larger vision for multiple projects on capitol hill. The staff of CCE and the Utah Historical Society continue to move this vision forward and are working on a history and culture museum, scheduled to open in 2026, that will highlight the unique and important stories of Utah's past. The proposed museum will have 17,000 square feet of exhibition space, a special exhibits gallery, educational classrooms, Engagement Room to access collections for research, and state-of-the-art collections storage for both the state's history and art collections.





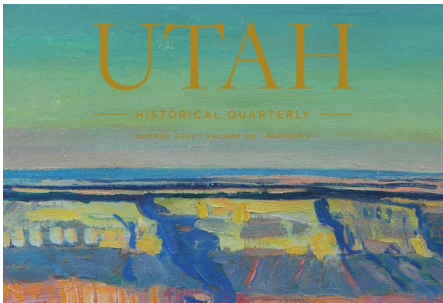
### **National History Day**

Established in 1980, National History Day in Utah is a year-long education program for students in grades 4-12 that develops historical thinking and research skills through active learning. By developing young peoples' understanding of the past, National History Day builds students who are better able to inform the present and shape the future.



### **Peoples of Utah Revisited**

The Peoples of Utah Revisited is an agency-wide initiative that seeks to widen the lens on Utah's history and amplify marginalized voices. Partnering with communities and scholars, the Utah Historical Society can create a deeper understanding of our shared history by shining a light on Utah's rich array of cultures, traditions, and experiences.



### **Publications**

Published since 1928, the *Utah Historical Quarterly* is the state's official history journal and features scholarly articles, essays, and other resources dedicated to Utah's history. Online resources include *I Love History* and *History to Go*.

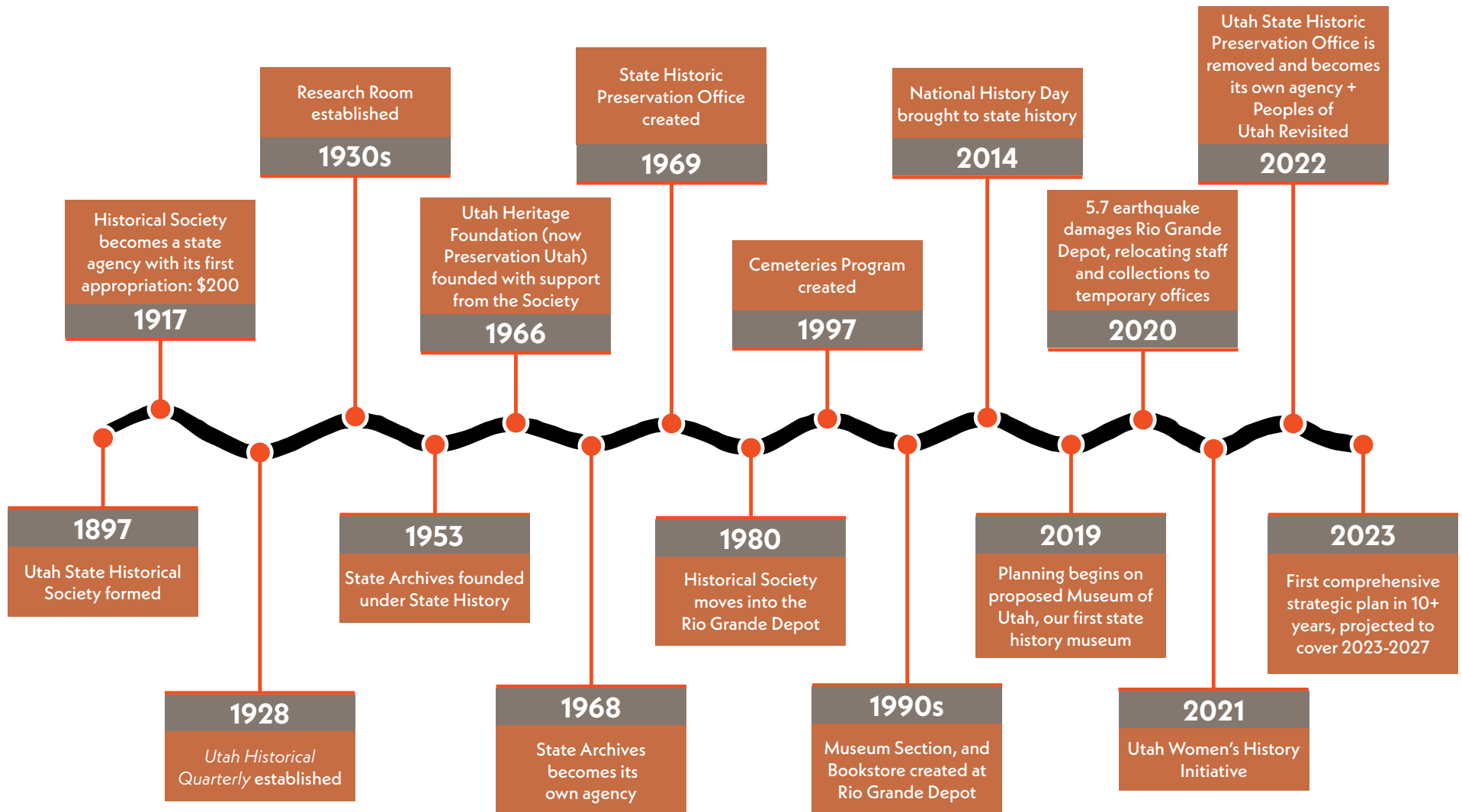


### **Women's History Initiative**

Started in 2021, the Women's History Initiative seeks to amplify women's stories in Utah's larger historical narrative, deepening our collective understanding and appreciation of the many roles women play in Utah's history.

# ORGANIZATIONAL HISTORY

The timeline below captures the critical paradigm shifts we have experienced since our formation in 1897. This does not include all moments of importance for our organization, but rather the identity-defining transitions between major chapters.



# OUR REALITIES & LANDSCAPE

## A Utah State Agency

The Utah Historical Society (UHS) is one of seven divisions of the Department of Cultural & Community Engagement (CCE). As a state division, we receive funding from the legislative process that supports our ongoing operations, staff, and programmatic efforts. While we are based in Salt Lake City, the UHS is a statewide organization that serves all areas of Utah. Our agency often partners with other state and non-profit organizations to ensure funding, programs, and engagement reach audiences from Logan to Bluff, urban to rural. As a part of the state's Executive Branch, our work is determined by a mixture of guiding direction from the Governor's Office, state code, and strategies outlined in this planning document.

## The State of History Practice and Practitioners

A multitude of reasons have led to a decline in history practitioners and investment across the country: from a focus on STEM in secondary and higher education, to a rise in so-called "history wars" and debate on revisionist history, history work is being threatened nationally. And yet, recent studies have shown that studying history provides individuals with the tools necessary to address complex issues and can promote learning and empathy across perceived divides and differences. Our team recognizes the challenges our field is currently experiencing and believes that we have the opportunity to help shape what the history field looks like in Utah by communicating the role and impact history has on Utahns, investing in history practices across the field, and widening the pipeline of practice to any and all Utahns wanting to do history work.

## A Shifting Organization

The UHS has been around in some form for more than 125 years, documenting and sharing Utah's history. We've changed a lot over the years, and we will continue to do so with recent developments. In the 2019 opening Utah legislative session, Speaker of the House Brad Wilson spoke about the creation of a state history museum, and in 2022, it

was determined that the museum would live under the Utah Historical Society. The UHS relocated to a new, temporary location following the 5.4 earthquake in 2020 that damaged the agency's historic home at the Rio Grande Depot. New Leadership was appointed in 2021 through the hire of Jennifer Ortiz as Director and, in 2022, the State Historic Preservation Office (SHPO) was removed from our agency and established as its own office under the same department. These recent developments and the creation of the Museum of Utah brings our agency the opportunity to rethink our current working practices and embrace a new future of public engagement, expanded scholarship, and a focus on public history.

## Additional Documents Informing Our Work

As part of the Department of Cultural & Community Engagement (CCE) and state government, we have several additional documents that help guide our work. The 2022-2027 [CCE Strategic Plan](#) provides a roadmap for all divisions under the umbrella of CCE. State History's strategic plan is informed and tracks back to the CCE Strategic Plan. Additionally, Governor Spencer Cox's [One Utah Road Map](#) and [Utah Home](#) provide guidance to us on how we can fit into a larger state plan.

## Name Change

As you read through this document, you will notice we use the name Utah Historical Society (UHS). As a part of our planning process and feedback we received in 2022, we will be going through an official name change process that will shift us from the Utah Division of State History to the Utah Historical Society. This change will better reflect who we are now and where we are headed to in the future, inclusive of the Museum of Utah and increased public engagement. We anticipate this change in July 2023; in an effort to have audiences get used to this change, we are using this name now.



# STRATEGIC PLANNING PROCESS

Union Creative Agency, in close collaboration with our staff and Board, facilitated our strategic-planning process. The process began in April 2022 and was completed in January 2023. It evolved through a series of seven interconnected phases full of conversation, inquiry, and collective learning.

- Phase 1: Discovery
- Phase 2: Mission, Vision, and Values
- Phase 3: Engagement
- Phase 4: Goals and Objectives
- Phase 5: Strategies and Implementation
- Phase 6: Plan Development
- Phase 7: Finalize and Present

The process began with a retreat for our Board and staff in May 2022 held at the Wheeler Historic Farm Education Center in Murray. During this retreat, we discussed our shared vision, values, mission, and goals for the next chapter of our organization through the lens of our organizational history.

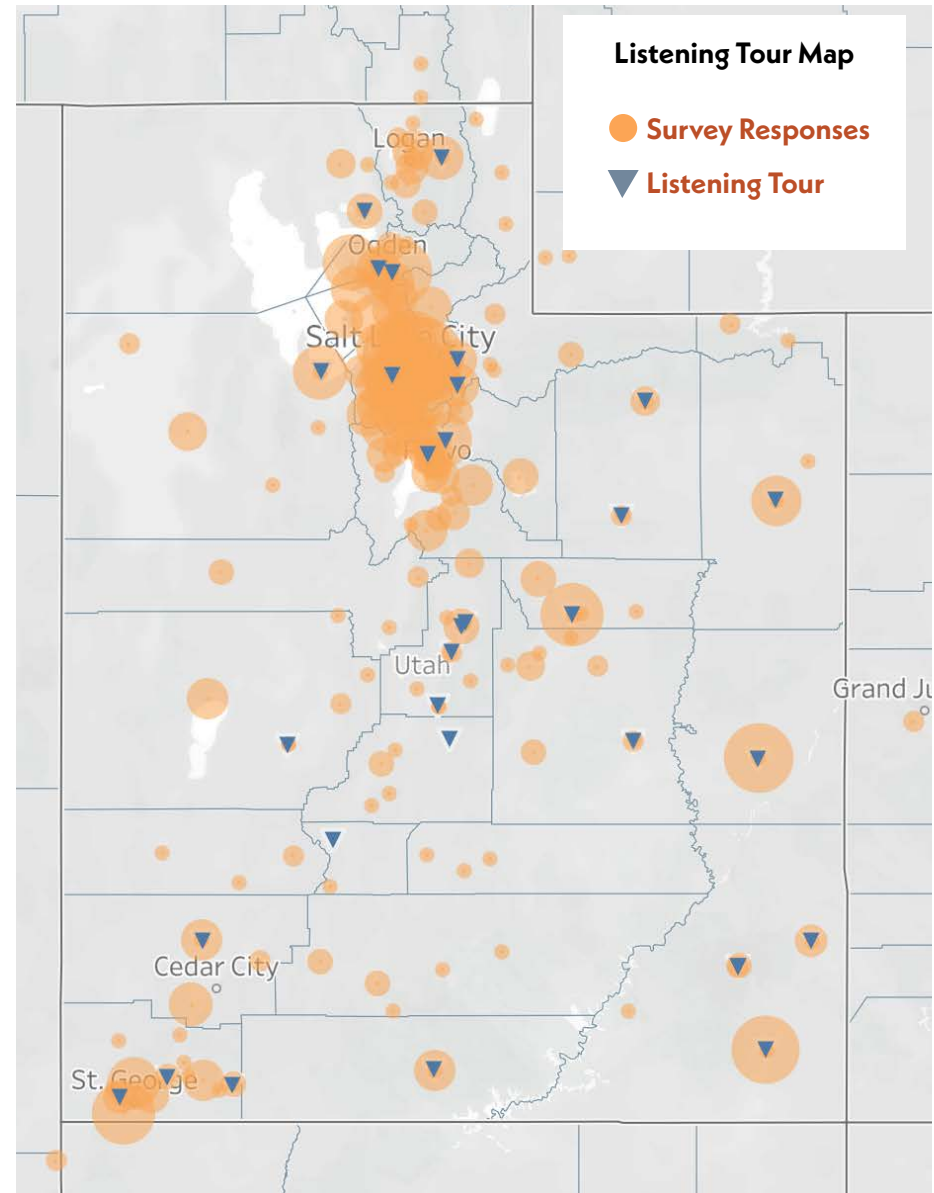


# STRATEGIC PLANNING PROCESS

The most robust phase, Phase 3: Engagement, began in July and concluded in October. As an organization, we prioritized this phase in the process because we wanted to ensure our strategic plan was strongly informed by the needs and aspirations of Utahns. Our engagement work included familiar groups and individuals, but was also expanded to include unfamiliar individuals as we broadened our reach. The Engagement phases included:

- Virtual Focus Groups. These focus groups were organized into the following stakeholder groups:
  - Cemeteries & Preservation
  - History Museums/Historical Societies
  - K-16 Educators
  - Partners & Trails
  - Scholars/Historians
  - Special Collections
  - State & Federal Agencies
  - Students
  - Tourism
  - Utah Westerners
- An online survey receiving 1,077 responses that reached every county in the state. The orange circles on the map to the right show the distribution of responses we received.
- Community Listening Tour led by staff. The tour consisted of community listening sessions and site visits. The blue triangles on the map to the right indicate the sites we visited.

The remaining phases included deep, and at times challenging, internal conversations about the future of our organization and the strategies we need to move into our next chapter.



# STRATEGIC PRIORITIES

As we developed our strategic priorities, we decided that all of our work will be guided by the concept of increasing inclusive and full history in all areas of our organization, not just programming. We are calling this our Central Priority. Inclusion work shows up in the budget we build, the makeup of our Board, and the content of the programs we run. As a direct result of feedback from our listening sessions and surveys, we prioritized centering this work and ensuring it lives within all of our strategic priorities moving forward.

While our Central Priority will guide our approach to all we do, the items with an **orange** bullet point on the following pages are those that most directly and immediately connect to our Central Priority.





## Strategic Priority: Strengthen the health and sustainability of our organization.

### **Develop an organizational culture, policies, and procedures that prioritize the health, capacity, and impact of our staff, interns, Board, committees, working groups, and programs.**

- Implement a system of considering and approving new initiatives to ensure we are not over-stretching staff capacity.
- Ensure we continue to have broad history experts represented on our staff, committees, partnerships, and Board.
- Develop clear policy, procedures, and job descriptions for Board members, working groups, and staff (including interns).
- Improve the onboarding process for new staff and Board members

### **To help bring greater understanding, respect, and unity in Utah, cultivate an internal culture that supports bringing attention to difficult areas of history; holds space for complex narratives; and ensures content and resources are built with intentionality toward approachability and accessibility for broad audiences.**

- Solidify permanent position / program for working with historically underrepresented communities to continue to collect, preserve, and share their histories.
- Evaluate and redevelop existing programs and resources to better support historically-underrepresented audiences.
- Align work with the Governor's [One Utah Roadmap](#) and [Utah Home](#).

### **Develop systems and processes to effectively collaborate within UHS, with CCE, and across sister agencies to carry out new multidisciplinary, public-facing, and collaborative projects.**

- Increase multi-disciplinary partnerships
- Develop a multi-year calendar of major themes, campaigns, and milestones for our organization.
- Serve as a conduit for resources from our sister agencies.

### **Increase and reprioritize resources in key areas of our organization to build for greater success and impact.**

- Conduct a work audit of staff time and capacity with the goal of better alignment of resources.
- Targeted project and program fundraising in key areas (i.e., the *Utah Historical Quarterly*, archives, collections, paid internships, scholars, etc.).
- Develop a robust fundraising program that includes capacity-building grants, recognizing donors, and a bequest program.
- Identify and provide training and resources to staff to improve their capacity, knowledge, and skill sets.
- Position UHS as a thought leader throughout the local, regional, and national history field.
- Explore opportunities for expanded benefits to UHS membership.

### **Invest in new technology and infrastructure to increase the accessibility, security, and efficiencies of our services, processes, and systems.**

- Improve, update, and/or replace systems such as: collections management system (CMS), phone applications, monuments and markers database, etc.
- Hire an evaluation consultant to create metrics for our agency to track.
- Develop consistency around documenting work processes across programs and projects.
- Invest in digitization across the agency, including increasing the accessibility of collections, maintaining digital assets at the Museum, and other digital needs as they arise.

### **Identify necessary core documents for the Museum of Utah and clarify the museum's placement in relation to the larger framework of UHS.**

- Audit UHS governing documents to identify where the museum is included or needs to be added to existing structure.
- Identify necessary additional core documents for the museum to align with American Alliance of Museum and American Association for State & Local History standards and develop new documents as needed.
- Create operations plan for the museum to address its role in UHS strategic priorities.

## Strategic Priority: Increase public outreach, community engagement, and audience development throughout our organization.

### Create additional and unique opportunities for collaboration with local history organizations, historical societies, social groups, municipalities/townships, higher education organizations, and history-loving community members.

- Develop an Outreach Services Team in continued partnership with Field Services to build relationships, develop opportunities for partnering, and preserving history.
- Amplify local history efforts and programming on the ground across Utah.
- Increase funding allocated to outreach and engagement efforts.
- Engage Utah communities in creating opportunities for dialogue about local history at leadership levels while also involving community members of all ages.
- Develop opportunities to broaden our reach beyond the public history ecosystem as a way of bringing new audiences into our work.
- Develop a Historian Council and honorary Historian Laureate position.

### Recognize and support Utah history work as an ecosystem.

- Support and steward state and local policies that support the health of the Utah history ecosystem.
- Host convenings and conversations about history work aimed at connecting the history ecosystem. These should move throughout the state and happen with regularity.
- Establish ourselves as a hub for history organizations, history-loving citizens, and history professionals throughout the state for resources and connection-making.
- Develop and support regional history nodes dedicated to local history across the state.
- Promote the Society's role as the focal point for scholars working in broad areas of interest.

### Build our capacity and ability to better understand our audiences and to increase our engagement with organizations, partners, and communities statewide.

- Identify opportunities for every program to find outward-facing components without straining their ability to do necessary internal work (i.e. identified partnerships for all work).
- Use data collected internally and externally to develop an understanding of the audiences who engage with our organization and those who do not.
- With primary focus on the audience, experiment with programming and content to make our organization relevant and experiential.

### Increase our relationship-building efforts, collaboration with, and support for historically underrepresented communities throughout Utah.

- Establish projects that serve as a pipeline for new audiences wanting to engage with history work of/by/and for communities by working with partners first, historical societies second.
- Develop deeper connections with historically underrepresented cultural/historical groups and rural Utahns through targeted partnering, grant giving, and other programmatic efforts.
- Deepen our long-term relationships with indigenous communities through ongoing dialogue and collaboration.
- Actively develop new collections materials to appropriately represent the demographics of Utah, both past and present.

### Establish the Museum of Utah as a core component of our public outreach, community engagement, research, and audience development efforts.

- Identify and align opportunities for the Historical Society to serve the museum and the museum to serve the Historical Society by integrating programs as much as possible.
- Continue to strengthen partnerships and work with small history museums through the We Are Utah model.
- Ensure access and accessibility to the museum for varied audiences coming to the museum, including children (K-12), local, regional, national, and international visitors.
- Increase audiences and visitorship to the Engagement Room.



## Strategic Priority: Enhance and clarify our outward communications and marketing efforts.

### **Develop resources and partnerships to more fully communicate the value, relevance, and impact of UHS, our partners, and the Utah history field broadly.**

- Create a marketing campaign that highlights history work happening throughout Utah.
- Create a report and campaign on history's educational, cultural, and economic impact on the state.
- Expand our leadership in sharing stories of Utah.
- Communicate that history adds authenticity, value, and belonging to communities.

### **Rebuild our website to improve user experience, accessibility, and back-end functionality.**

- Restructure website to be geared toward audiences and uses rather than programs.
- Clearly identify staff members and their roles.
- Utilize the website as a platform to share resources and stories from local communities and partners.
- Communicate events; use Now Playing Utah for all external events and festivals and direct our partners to use this platform.
- Ensure website re-build and new marketing materials align with current disability and language accessibility standards.

### **Create and implement a new brand identity and organizational ethos for the Utah Historical Society.**

- Define a new organizational ethos and brand positioning strategy.
- Develop a new logo and style guide.
- Implement a public relations campaign to unveil the new brand identity.
- Update all marketing platforms and materials to reflect the new brand identity.

### **Increase resources and systems for marketing and communications.**

- Hire a marketing manager.
- Raise awareness of who we are, what we do, and how we can help our communities.
- Centralize marketing processes and efforts across programs and initiatives.
- Expand language accessibility of key materials (Americans with Disabilities Act (ADA), English Language Learners (ELL), etc.).
- Develop and implement a communications plan that includes three key prongs: critical thinking and civic engagement, articulate a more complete account of Utah's history, and communicate the significance and relevance of history and history work.
- Develop processes for producing collaborative promotional content such as the blog, newsletter, and social media posts/engagement.

## Strategic Priority: Expand opportunities to exchange knowledge and resources that support the practice of history with all constituents statewide.

### **Serve as a connection point to non-UHS history and humanities resources.**

- Annually conduct an audit / survey of specific resources needed throughout the state to ensure we are regularly aware of opportunities and to avoid duplication.
- Facilitate connection to resources from other local, regional, and national resources.

### **Increase our engagement with K-12 education.**

- Become an active partner in the development of local and state educational curricula and civic engagement.
- Convene students and spotlight history scholarship.
- Facilitate better connection of the artifact collection to research and school curriculum.
- Develop a framework for the Museum of Utah to serve the K-12 audience, particularly 4th and 7th grade students.

### **Create more opportunities for community members, history organizations, and professionals to engage in history work.**

- Training: Host and promote workshops and trainings, develop a framework to implement a Master Community Historian Program, and provide technical assistance and capacity building support to history organizations and societies throughout Utah.
- Convening: Cultivate strategic convenings / symposiums that enable space for scholars to connect through new research, foster the history pipeline to include emerging historians (e.g. college students, underrepresented communities, emerging professionals, etc.), and cultivate relationships with colleges, universities, professors, and students.
- Resources: Develop grant opportunities to support history work and to develop a toolkit of resources that support history organizations and professionals, and support communities throughout Utah in telling the diverse, complex, and often-excluded parts of their local history.

# IMPLEMENTATION

This strategic plan will serve as a guiding document for our team as we navigate the coming years. The following tools will be used to aid our team in implementing and tracking progress toward this plan.

- Develop working groups informed by the Strategic Priorities.
- Align Board Committees with Strategic Priorities.
- Utilize the developed Decision Making Tool to align work and decisions to the strategic plan.
- Develop an implementation timeline that includes phasing and key milestones. This will align with the new historical society organizational structure.
- Modify existing program plans' structure and processes to align with the strategic plan.
- Develop an implementation tracking tool. Update, communicate, and celebrate progress quarterly.
- Allocate or reprioritize resources in alignment with the strategic plan.

# ACKNOWLEDGMENTS

We want to thank the many collaborators and participants who have made this plan possible. From our staff and Board to the 1,000+ Utahns who shared their feedback. The incredible engagement we have received, conversations we have had, and relationships we have grown through this process have been energizing. With our strategic plan now complete, we look forward to continuing the conversations and relationships we have started with all of you.

We also want to extend a “thank you” to the many communities and organizations who hosted our statewide listening tour.

## Listening Tour Sites

- Cove Fort Historic Site (Beaver)
- Edge of the Cedars Museum (Blanding)
- Bluff Community Center (Bluff)
- Bluff Fort (Bluff)
- Brigham City Museum of Art & History (Brigham City)
- Frontier Homestead Museum (Cedar City)
- Duchesne County Library (Duchesne)
- Pope House Museum (Duchesne)
- DUP Hansen House (Ephraim)
- Ephraim Co-Op (Ephraim)
- Fairview Museum of History (Fairview)
- John Wesley Powell River History Museum (Green River)
- Casino Star Theater and Main Street (Gunnison)
- Kanab Town Hall (Kanab)
- Silver Reef Museum (Leeds)
- Cache Valley Historical Society (Logan)
- Marysville Utah Dance Pavilion (Marysville)
- Moab Museum (Moab)
- USU Monticello Offices (Monticello)
- Mormon Pioneer National Heritage Area (Mt. Pleasant)
- Relic House (Mt. Pleasant)
- Wasatch Academy (Mt. Pleasant)
- Museums at Union Station (Ogden)
- Weber State University (Ogden)
- Alf Engen Museum (Park City)
- Park City Museum (Park City)
- Utah Prehistoric Museum (Price)
- Museum of Mexican Mormon History (Provo)
- Roosevelt City Hall (Roosevelt)
- CCC and POW Camp (Salina)
- Spring City municipal offices and Main Street (Spring City)
- Springdale Town Hall (Springdale)
- McQuarrie Daughters of Utah Pioneers (St. George)
- Tooele Library (Tooele)
- Uintah County Library (Vernal)
- Vineyard City Offices (Vineyard)
- Utah Cultural Celebration Center (West Valley City)

# ACKNOWLEDGMENTS

## **Administration**

Jennifer Ortiz, Director  
Kevin Fayles, Assistant Director  
Alycia Rowley, Administrative Assistant  
Veronica Solano Arangure, Administrative Assistant  
Mercedes Clifford, Intern

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Amy Barry, Program Manager  
Bernice Payne, Assistant

## **Library & Collections**

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Sabrina Sanders, Artifacts Collection Manager  
Lisa Barr, Historical Collections Curator  
Chase Roberts, Artifacts Collections Coordinator  
Michele Elnicky, Librarian / Historical Collections Specialist

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Holly Andrew, Exhibits Manager

## **National History Day**

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Heidi Chudy, NHD Assistant  
Tatiana Chudy, NHD Assistant  
Shavauna Munster, Social Media

## **Peoples of Utah Revisited Initiative**

Monique Davila, Community Engagement Coordinator  
Jordan Kiyak, Research Outreach Coordinator

## **Publications**

Holly George, Editor, *Utah Historical Quarterly* | Senior State Historian

## **Women's History Initiative**

Katherine Kitterman, Women's Historian

## **Board Members**

Molly Cannon, Chair  
Spencer Hall, Vice-Chair  
Tara Beresh  
Ignacio Garcia  
Margaret Olson  
Axel Ramirez  
David Rich Lewis  
David Richardson

A special thanks to our CCE Leadership:

Jill Remington Love, Executive Director  
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